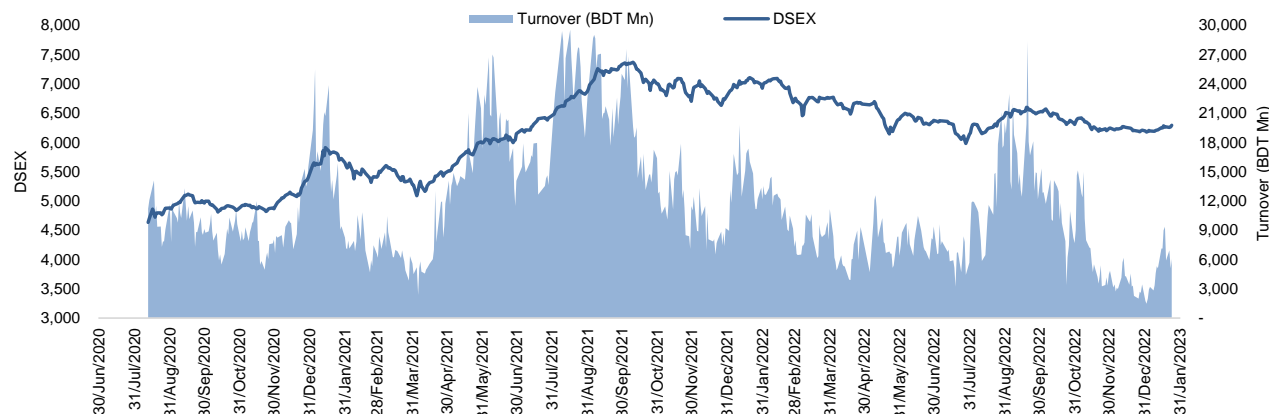


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.44%) gained 27.8 points and closed at 6,291.30. The blue-chip index DS30 (+0.69%), the Shariah-based index DSES (+0.52%), and the large-cap index CDSET (+0.33%) closed at 2,226.98, 1,372.22, and 1,223.51 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.59% followed by Fuel & Power (+0.05%), Food & Allied (+0.04%), Engineering (+0.02%). Bank experienced the highest loss of 0.1% followed by NBF1 (-0.03%), Telecommunication (0.00%). Block trades contributed 10.2% of the overall market turnover. Bangladesh Shipping Corporation (+5.2%) was the most traded share with a turnover of BDT 451 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,291.30	6,263.51	+27.80	+0.44%	+1.4%
DS30	2,226.98	2,211.72	+15.26	+0.69%	+1.4%
DSES	1,372.22	1,365.17	+7.05	+0.52%	+1.0%
CDSET	1,223.51	1,219.52	+3.99	+0.33%	+0.7%

	Advanced	Declined	Unchanged	Total
All Category	71	102	178	351
A Category (Equity)	59	44	131	234
B Category (Equity)	9	45	40	94
N Category (Equity)	2	3	3	8
Z Category (Equity)	1	10	4	15
Mutual Funds	0	2	23	25
Corporate Bonds	0	1	2	3
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,667,726	7,577,822	+1.2%
	Mn USD	72,766	71,913	
Turnover	Mn BDT	6,077	5,096	+19.2%
	Mn USD	58	48	
Volume	Mn Shares	92	79	+15.7%
	No. of Trade	126,738	117,379	+8.0%

* Average Interbank Exchange Rate is BDT 105.38 as of Jan 23, 2023

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Figure: Sectorial Turnover (BDT Mn)

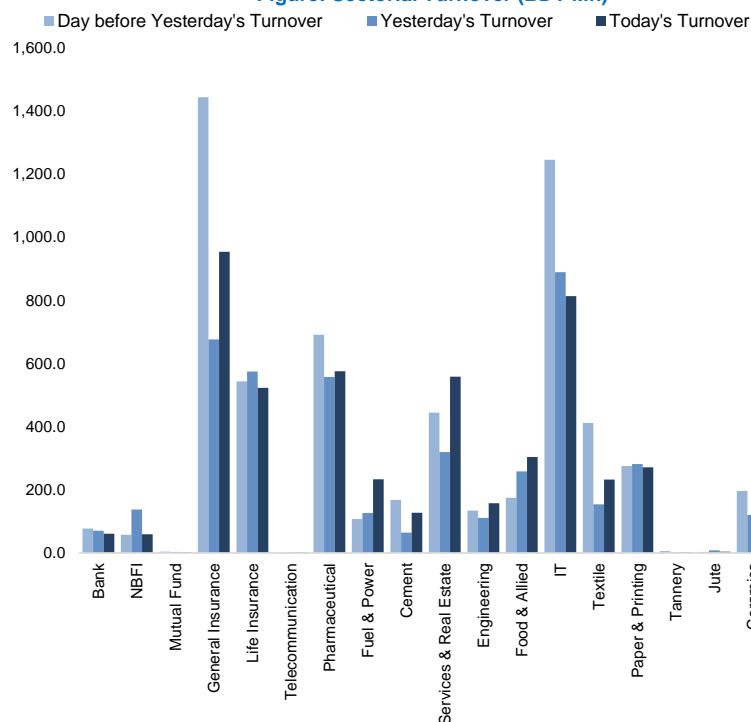
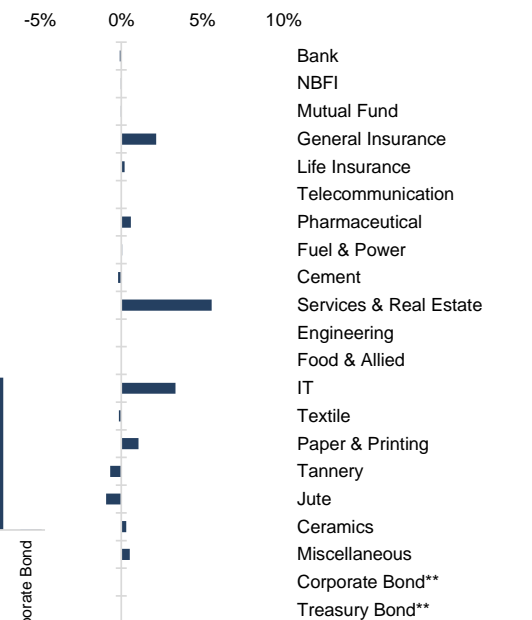


Figure: Sectorial Mcap Change



Market PE 17.3x

Market PB 1.5x

Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB	Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
Bank	1,432	1,433	-1.49	-0.10%	34	668,711	8.8%	60.8	1.1%	7.8x	0.7x	GP	386,996	8.6%	1.2	11.2x	9.1x
NBFI	1,930	1,931	-0.51	-0.03%	23	188,291	2.5%	59.3	1.1%	NM	4.5x	WALTONHIL	317,378	7.0%	0.0	35.7x	3.3x
Mutual Fund	851	851	-0.19	-0.02%	37	38,464	0.5%	2.2	0.0%	NM	0.8x	BATBC	280,098	6.2%	1.3	16.8x	6.7x
General Insurance	3,545	3,471	+74.87	+2.16%	42	103,478	1.4%	953.8	17.5%	17.4x	1.7x	SQURPHARMA	185,977	4.1%	3.7	10.0x	1.7x
Life Insurance	2,679	2,674	+5.61	+0.21%	14	75,136	1.0%	522.8	9.6%	NM	NM	ROBI	157,138	3.5%	0.0	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	1.2	0.0%	15.4x	4.9x	RENATA	139,689	3.1%	0.2	28.1x	4.6x
Pharmaceutical	3,792	3,770	+22.15	+0.59%	34	735,623	9.7%	575.4	10.5%	18.7x	2.4x	UPGDCL	135,475	3.0%	0.0	13.6x	3.8x
Fuel & Power	1,692	1,692	+0.90	+0.05%	23	446,234	5.9%	233.4	4.3%	14.4x	1.1x	BEXIMCO	101,302	2.2%	0.5	8.2x	1.2x
Cement	2,317	2,322	-4.48	-0.19%	7	111,306	1.5%	127.2	2.3%	33.5x	2.5x	BERGERPBL	80,299	1.8%	2.6	26.1x	7.0x
Services & Real Est	2,150	2,037	+113.43	+5.57%	8	84,961	1.1%	558.3	10.2%	48.4x	1.1x	MARICO	76,277	1.7%	0.6	20.7x	28.6x
Engineering	4,493	4,492	+1.10	+0.02%	42	527,364	7.0%	157.1	2.9%	38.6x	1.8x	ICB	74,119	1.6%	0.2	68.1x	1.6x
Food & Allied	21,160	21,151	+8.11	+0.04%	21	377,032	5.0%	303.9	5.6%	21.4x	7.4x	BEACONPHAR	73,112	1.6%	90.2	89.9x	11.8x
IT	3,382	3,273	+109.39	+3.34%	11	44,092	0.6%	813.5	14.9%	31.4x	3.0x	BXPBARMA	66,248	1.5%	27.2	13.0x	1.6x
Textile	1,601	1,603	-2.45	-0.15%	58	168,288	2.2%	232.2	4.3%	30.6x	1.0x	BRACBANK	57,619	1.3%	0.1	10.9x	1.0x
Paper & Printing	10,871	10,756	+114.66	+1.07%	6	41,884	0.6%	270.8	5.0%	47.1x	2.1x	ISLAMIBANK	53,452	1.2%	3.4	10.9x	0.8x
Tannery	3,032	3,053	-20.78	-0.68%	6	32,025	0.4%	2.7	0.0%	38.9x	3.0x	DUTCHBANGL	43,554	1.0%	0.5	7.4x	1.1x
Jute	12,672	12,791	-118.65	-0.93%	3	3,100	0.0%	4.0	0.1%	NM	109.4x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	696	693	+2.11	+0.30%	5	32,170	0.4%	97.4	1.8%	33.8x	1.9x	POWERGRID	37,347	0.8%	0.7	38.5x	0.4x
Miscellaneous	4,115	4,094	+21.18	+0.52%	14	221,774	2.9%	482.3	8.8%	12.4x	1.8x	SUMITPOWER	36,308	0.8%	0.2	10.0x	0.9x
Corporate Bond**	88	88	-	-	9	36,415	0.5%	1.0	0.0%	NM	NM	BSCCL	36,098	0.8%	0.0	14.9x	3.4x
Treasury Bond**	96	96	-0.02	-0.02%	252	3,071,349	40.5%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
EHL	91.5	+10.0%	171.3	14.4x	1.2x
SEAPEARL	273.7	+8.2%	174.5	NM	21.0x
PIONEERINS	79.6	+7.3%	108.4	12.9x	1.7x
DHAKAINS	65.0	+6.4%	49.4	19.9x	2.0x
INTRACO	38.4	+6.4%	163.3	31.1x	3.0x
UNIQUEHRL	66.8	+6.2%	161.9	17.9x	0.8x
BENGALWTL	34.3	+5.9%	52.2	67.3x	1x
ADNTEL	119.4	+5.4%	36.3	40.2x	4.2x
GENEXIL	102.1	+5.3%	384.0	30.1x	5.8x
BSC	132.2	+5.2%	450.6	9.2x	1.7x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,685	7.1%	10.0x	1.7x
BATBC	74,086	4.4%	16.8x	6.7x
BEXIMCO	70,355	4.1%	8.2x	1.2x
RENATA	68,196	4.0%	28.1x	4.6x
BEACONPHAR	51,178	3.0%	89.9x	11.8x
BXPBARMA	46,254	2.7%	13.0x	1.6x
GP	38,700	2.3%	11.2x	9.1x
BRACBANK	30,976	1.8%	10.9x	1.0x
LHBL	26,581	1.6%	18.4x	4.1x
ISLAMIBANK	24,010	1.4%	10.9x	0.8x
NBL	19,116	1.1%	NM	0.6x
PUBALIBANK	18,525	1.1%	5.5x	0.6x
CITYBANK	17,615	1.0%	4.5x	0.8x
SEAPEARL	17,572	1.0%	NM	21.0x
ROBI	15,714	0.9%	NM	2.4x
OLYMPIC	15,088	0.9%	19.7x	2.5x
ALARABANK	14,609	0.9%	14.6x	1.1x
BSRMLTD	14,417	0.8%	62.6x	0.7x
ORIONPHARM	14,039	0.8%	21.8x	1.0x
UPGDCL	13,547	0.8%	13.6x	3.8x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BSC	132.2	+5.2%	450.6	9.2x	1.7x
GENEXIL	102.1	+5.3%	384.0	30.1x	5.8x
AAMRANET	62.6	+4.3%	222.4	27.3x	1.7x
GEMINISEA	424.3	-1.1%	204.8	30.9x	23.0x
SEAPEARL	273.7	+8.2%	174.5	NM	21.0x
EHL	91.5	+10.0%	171.3	14.4x	1.2x
MEGHNALIFE	94.4	+2.1%	168.9	NM	NM
INTRACO	38.4	+6.4%	163.3	31.1x	3.0x
UNIQUEHRL	66.8	+6.2%	161.9	17.9x	0.8x
BPML	88.9	+3.1%	151.7	23.8x	1.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONINFU	352.0	-4.2%	97.3	NM	23.8x
MTB	16.6	-2.4%	1.9	3.5x	1x
BATASHOE	940.3	-1.5%	0.4	36.3x	3.5x
GEMINISEA	424.3	-1.1%	204.8	30.9x	23.0x
MALEKSPIN	28.8	-1.0%	63.9	7.1x	0.6x
PRIMEBANK	19.3	-1.0%	0.9	6.3x	0.7x
ZEALBANGLA	149.0	-1.0%	0.0	NM	NM
HFL	19.9	-1.0%	4.0	21.2x	0.5x
APEXFOODS	278.7	-1.0%	19.9	43.1x	2.1x
JUTESPINN	278.8	-1.0%	0.0	NM	NM

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SONALIPAPR	615.0	598.8	7.0	159	97.75
ISLAMIBANK	35.5	35.5	2.0	2,709	96.18
GP	265.0	261.6	39.0	154	40.35
SEAPEARL	270.0	230.9	12.0	158	38.81
FORTUNE	83.2	68.2	7.0	505	37.73
BDCOM	44.9	44.9	4.0	792	35.57
SALVOCHEM	61.8	61.7	3.0	362	22.32
BEACONPHAR	310.0	290.0	10.0	71	20.75
INTRACO	37.0	35.0	7.0	523	18.70
BATBC	479.8	479.8	15.0	38	18.35

* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.
 ** The base of the Bond Index starts at 100, starting from Jan 13, 2022.
 Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SONALIPAPR	615.0	598.8	97.8	159	7
ISLAMIBANK	35.5	35.5	96.2	2,709	2
GP	265.0	261.6	40.3	154	39
SEAPEARL	270.0	230.9	38.8	158	12
FORTUNE	83.2	68.2	37.7	505	7
BDCOM	44.9	44.9	35.6	792	4
SALVOCHEM	61.8	61.7	22.3	362	3
BEACONPHAR	310.0	290.0	20.7	71	10
INTRACO	37.0	35.0	18.7	523	7
BATBC	479.8	479.8	18.3	38	15
BENGALWTL	32.6	31.6	17.7	546	5
POWERGRID	54.0	47.2	17.4	326	3
SQURPHARMA	203.9	201.5	16.3	80	22
ORIONINFU	399.6	399.6	14.0	35	1
MARICO	2,350.0	2,340.0	11.8	5	8
BEXIMCO	114.9	104.1	11.2	107	16
BRACBANK	34.7	34.7	7.4	215	3
COPPERTECH	36.9	34.0	7.1	194	4
MERCANBANK	13.6	13.6	7.0	513	1
METROSPIN	54.4	54.4	5.4	100	1
ORIONPHARM	91.1	89.9	5.0	56	2
BSC	130.0	130.0	4.6	35	1
Total			617.5		253

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		

Important DSE News

SIMTEX

(Q2 Un-audited): EPS was Tk. 0.21 for October-December 2022 as against Tk. 0.26 for October-December 2021; EPS was Tk. 0.45 for July-December 2022 as against Tk. 0.43 for July-December 2021. NOCFPS was Tk. 2.55 for July-December 2022 as against Tk. (0.56) for July-December 2021. NAV per share was Tk. 22.04 as on December 31, 2022 and Tk. 22.39 as on June 30, 2022.

EHL

(Q2 Un-audited): EPS was Tk. 2.09 for October-December 2022 as against Tk. 1.89 for October-December 2021; EPS was Tk. 3.13 for July-December 2022 as against Tk. 2.64 for July-December 2021. NOCFPS was Tk. 15.10 for July-December 2022 as against Tk. 17.24 for July-December 2021. NAV per share was Tk. 75.84 as on December 31, 2022 and Tk. 74.71 as on June 30, 2022.

MARICO

(Q3 Audited): EPS was Tk. 30.93 for October-December 2022 as against Tk. 27.35 for October-December 2021; EPS was Tk. 94.45 for April-December 2022 as against Tk. 90.08 for April-December 2021. NOCFPS was Tk. 123.01 for April-December 2022 as against Tk. 101.75 for April-December 2021. NAV per share was Tk. 84.81 as on December 31, 2022 and Tk. 82.04 as on December 31, 2021.

SBACBANK

Mizanur Rahman and Shamsun Nahar Rahman, the Sponsors of the Company, has expressed their intention to sell 35,56,263 shares and 33,82,156 shares respectively out of their respective holdings of 36,56,263 shares and 34,82,156 shares of the Company at prevailing market price (In the Block Market) through Dhaka Stock Exchange (DSE) within next 30 working days.

SEAPEARL

The Company will be placed in 'A' category from existing 'B' category with effect from January 25, 2023 as the Company has reported disbursement of 15% cash dividend for the year ended June 30, 2022.

AFCAGRO

Md. Sayadur Rahman, one of the Sponsors of the Company, has expressed his intention to sell his entire holding 25,46,277 shares (in the Block Market) whereas AFC Capital Limited, a Corporate Director of the company, has expressed its intention to buy 25,46,277 shares at prevailing market price (in the Block Market) through Dhaka Stock Exchange within next 30 working days.

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